TM Usability

Module	Description			How To
Tank Managem ent	1. Create a Tank Device			Go to Tank Management menu > **Devices**
				Click the **New** toolbar button. Enter the **Serial Number** and **Tank Capacity.** Select the **Tank Type** Fill in the other fields and click the **Save** button *Note: The highlighted are the required fields for Devices screen. Serial Number can't be duplicated. If serial number exist, kind. number and save.*
	2. Create a Consumption Site			Go to Tank Management menu > **Customer Inquiry**

Select a customer and click **View** toolbar button

On Customer Inquiry screen, click **Site** button

Click the **New Site** button to add a site. This is the **+** button on the Site Address panel.

Enter the details on **Site** tab.

The **Description** and **Address** entered on the site tab should be the same with the Description and Address displayed on the
Address panel.

Use **Copy Customer Address** button to copy the Address, Zip Code, City, State and Country of the customer on the site fields

Select a value for the ff: Driver, Route, Location, Clock, Account Status, Tax State ID, Class Fills, Item and Fill Method.

Enable/Check **Sales Tax** Option.

On **Details** tab, enter details for **Instructions** and **Comments** field. Click **Save** toolbar button and close the screen.

	3. Attach Devices to Consumption Site	Go to Tank Management menu > **Consumption Site**

a. Attach Customer Owned

Select the site you have created on **Search Consumption Site** screen. Click **View** toolbar button to open the site.

Attach a customer owned device on the site by clicking **Attach Device** menu button and select **Attach Customer Owned**.

Enter details and select a **Tank Type**. Click **Save** button.

The device will be displayed on the **Devices tab** grid.

| | | | b. Attach Company Owned. | | Attach a company owned device on the site by clicking **Attach Device** menu button and select **Attach Company Owned**.

Search for the tank that has been created in Step #1. Select the device and click **Open Selected** button to attach the device.

The device will be displayed on the **Devices tab** grid.

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| | | | Under Site tab | Navigate to **Site** tab.

Total Capacity and **Total Reserve** will display the sum of the devices attached to the site.

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			Under Events tab	Navigate to **Event History** tab.

Navigate to **Event History** tab.

History of the devices attached will be displayed in grid.

Select an event and click **View** button. **Event History** form for the selected device event will display.

c. Add a Lease

Go back to **Devices** tab and select the Company Owned device on the grid.

Click **View** button.This will open the Devices screen.

Click **Lease** button. Enter and fill in the needed details and **Save**.

Close the Lease screen. **Lease No** will display in **Lease Number** field of the Devices form.

4. Add Appliances

Navigate to **Appliances** tab.

Add and select 2 appliance type and enter the remaining details on the grid. **Save** the site form.

	5. Create a Call in Order			Using the same customer site, click **Call Entry** toolbar button.
				Tab focus will be on the Call Entry tab. Enter details in **Comments** field. Click **Save** toolbar button.
	6. Create a Consumption Site Event			Click **Create Events** toolbar button.
				Level will be automatically set to **Consumption Site**.
				Select a **Performer ID** and click **Save** button.
				Navigate to **Event History** tab.
				Event-004 and its description will display on the grid.

	7. Add Work Order			Navigate to **Work Order** tab. Click **Work Order** and select **Add Work Order**. Add date in **Date Scheduled** field and enter details in **Additional Info** field. Select a work order item in **To Do Items** panel. **Save** the work order.
	8. Associate a Site			*Pre- requisite:* There should be 2 or more sites to continue with associating a site. You can associate a site from other or same If there is 1 or none existing site, repeat Steps # 2 and 3.
			Base Site	Select the site to associate in Site Address panel. Click **Site Actions** toolbar button and select **Associate Site**. Select '**Base**' as the **Association Type.** Click **Find** button and select a site you want to associate. Click **OK** button. The site will be associated and will display in **Associated Sites** tab under the **Base** group.

| | | Link Site | Click **Site Actions** menu button and select **Associate Site**.

Select '**Link'** as the **Association Type.**

Click **Find** button and select a site you want to associate. Click **OK** button.

The site will be associated and will display in **Associated Sites** tab under the **Link** group

Select an associate site and click the **View** button. This will direct you and will let you view the associated customer site. **Close** site form. |
| --- | --- | --- | --- |
| | 9. Reassign a Site | | Go to Tank Management menu > **Consumption Site**

Select the first site you have created on **Search Consumption Site** screen. Click **View** toolbar button to open the site.

Click **Site Action** menu button and select **Reassign Site** button.

The message below will display since the site you'll reassign has an open call entry. Click **Yes** button.
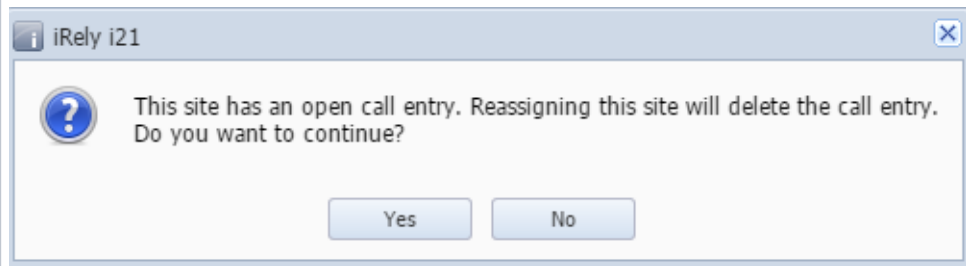
The confirmation message 'Are you sure you want to re-assign this Site?' will follow. Click **Yes** button.

Since the attached device has a lease, reassigning a site will display this message. Click **Yes** button.
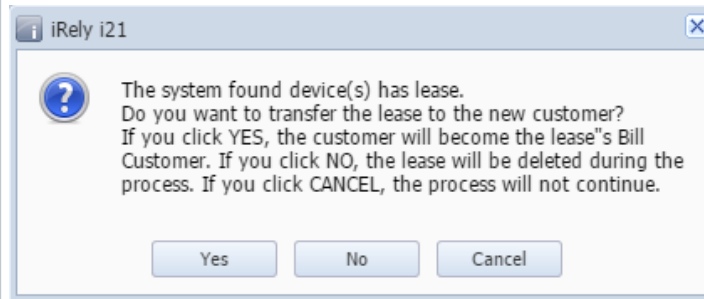
Reassigning Site loading message will display. After that, the message asking if you want to load the new site record will prom |

The new site will be loaded. Customer details on the upper panel will display the new customer's info. The Site will display belo
existing sites.

Navigate to **Devices** tab. It will display the 2 attached devices from previous customer site.

Select the **Company Owned** device and click the **View** button.

In Devices form, click **Lease** button. **Bill Customer** and **Name** will now display the new customer's info. **Close** the Lease and

Navigate to **Associated Sites** tab. It will display the associated sites from the previous customer site.

Navigate to **Appliances** tab. It will display the appliances type from the previous customer site.

Navigate to **Call Entry** tab. No call in order will display. It should be removed during the reassignment.

Navigate to **Event History** tab. **Event-001** and **Event-005** will display on the grid.

Navigate to **Work Orders** tab. No work order will display. It should be removed during the reassignment.

Close the form.

Go to Tank Management menu > **Customer Inquiry**

Search for the original customer site you have created and click **View** button.

On **Customer Inquiry** screen, click **Site** toolbar button.

The **Consumption Site** will displayed but it is deactivated. **Active** check box is unchecked.